

# Acquiring Mid-Level Donors, Digitally



[DoingGoodAgency.com](http://DoingGoodAgency.com)



# Introduction

**We know hospitals.** We've developed and implemented digital strategies for some of the leading hospitals and hospital foundations in the country.

In the last couple of years, more and more clients have been asking how to utilize their digital tools to grow their mid-level programs. Especially as resources are thin and gift officers are focusing on larger gifts and prospects.

This whitepaper aims to provide you with an overview on how to grow your mid-level program primarily through email.

**If you are not a hospital or hospital foundation, you can still implement this strategy.**



# Why Now?

As giving trends have shifted in the last few years and more fundraising programs and initiatives move online, there is a new industry-wide focus on the importance of mid-level giving.

For some organizations, the primary goal of their annual program is to acquire mid-level donors. That's because a mid-level gift can be a strong indicator of future major donors, and major donors often bring in the vast majority of revenue. Some of our clients are even re-focusing their annual targets around donor count instead of revenue with the premise that more donors lead to more potential mid-level and major donors.

Let's be clear – we are not saying that annual program revenue is not important, and for some organizations, annual fund revenue is vitally important. But for many organizations that rely heavily on major gifts, growing the number of mid-level donors can be one of the best ways to grow your major gift pipeline.

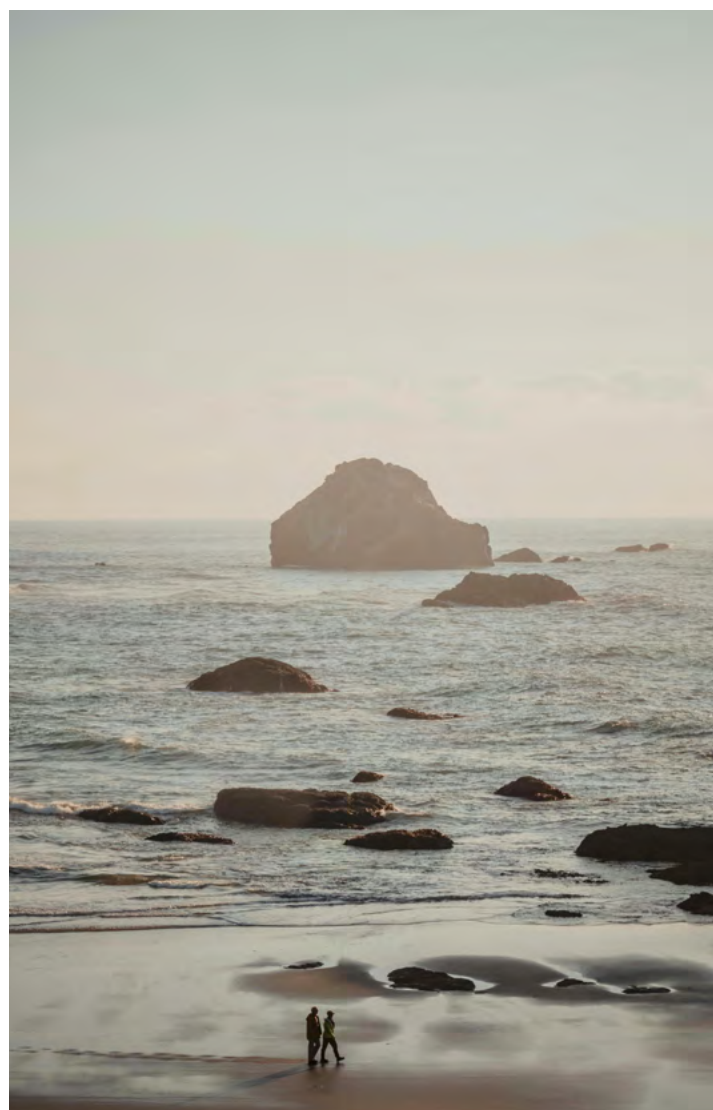
But with tighter budgets and reduced gift officer headcounts, it begs the question, how can we grow our mid level donor pool - efficiently?



Donor Count → Mid-level Donors → Major Donors

# Technology as the facilitator

**Technology and clever email programs could be the answer!**  
By allowing gift officers to focus on their biggest and most profitable relationships, we propose that a well-planned email program with automation, personalization, and maybe even some AI, could allow organizations to upgrade and cultivate a wider number of mid-level donors without significantly increasing their gift officer head count.





# Creating a mid-level acquisition strategy

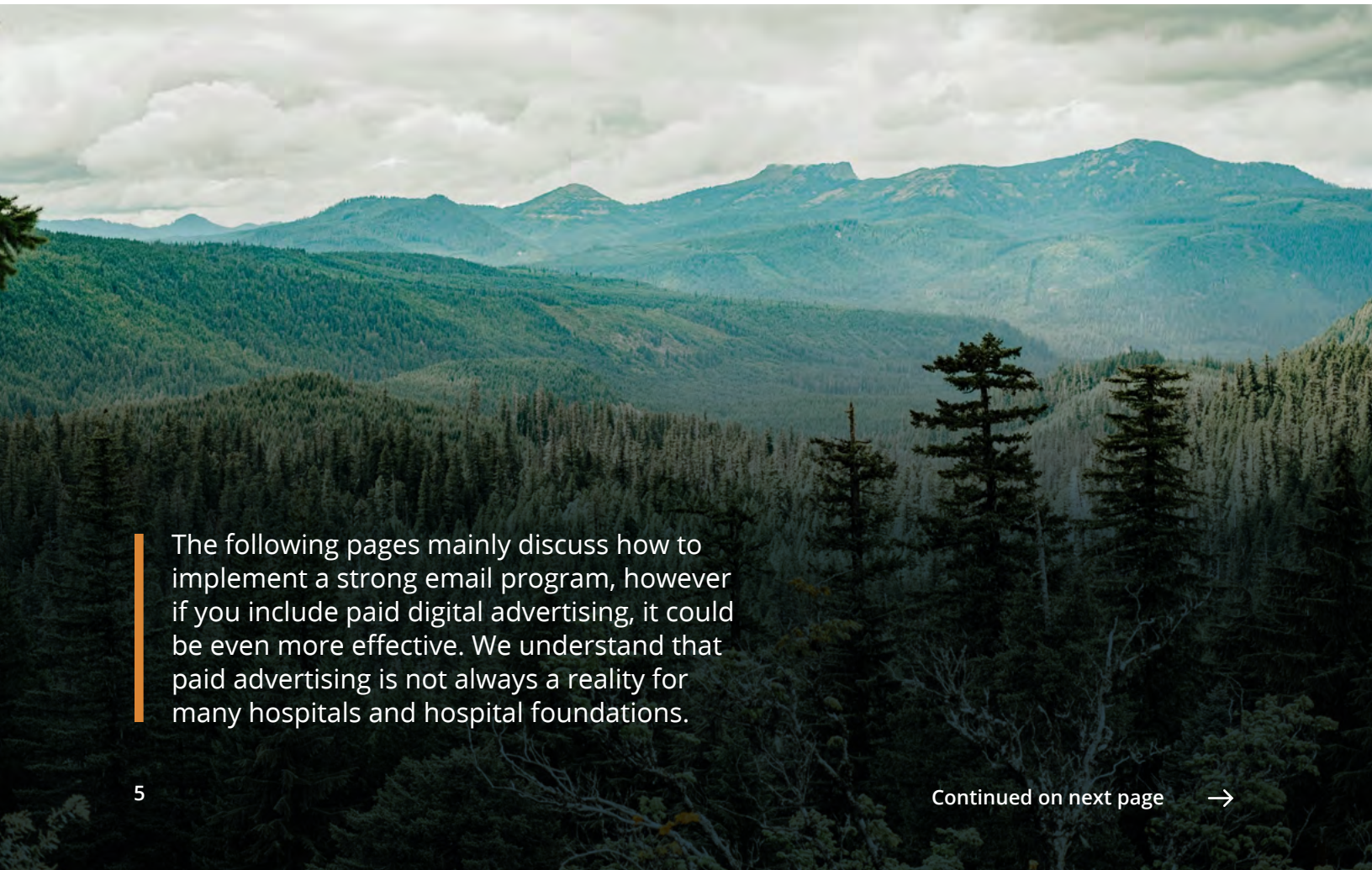
With the assumption that you have the ability for automation and personalization, here are 4 steps to create a strong mid-level acquisition and cultivation strategy. If your email platform does not have these essential functions, see page 11 for an overview of technology considerations.

1

2

3

4



The following pages mainly discuss how to implement a strong email program, however if you include paid digital advertising, it could be even more effective. We understand that paid advertising is not always a reality for many hospitals and hospital foundations.

# Step 1

1

2

3

4

## Define your mid-level program

Many organizations aspire to have a formal named program. If you don't have executive buy-in for a named program at this time, it is not a deal-breaker. But if you are able to create a named program we strongly encourage it.

Next, we need to define a range. We see mid-level definitions ranging from \$1,000 to \$100,000, but it all depends on the revenue and size of each organization.

Adding benefits to the program can be an excellent way to inspire more upgrades. Benefits such as:

- ✓ Exclusive access to events
- ✓ Monthly letter from a senior executive
- ✓ Access to tours and other resources
- ✓ Virtual events - such as a virtual cooking class or webinar about a topic of interest
- ✓ Small gifts or tokens of the organization (who doesn't love a tote bag)
- ✓ Sneak previews of big initiatives





## Step 2

1 — 2 — 3 — 4

### Define your mid-level prospect criteria

Many organizations are running sophisticated scoring algorithms to identify mid and major prospects. However, through digital channels, we can target a wider volume of prospects regardless of scoring and AI models. We can even use digital engagement to influence and inform prospect scoring models.

Therefore we recommend a mid-level prospect be defined as someone who is just slightly below your mid-level giving threshold. If the lower band of your mid-level program is \$1,000, then we recommend that any donor who makes at least a \$500 gift be considered a mid-level prospect.

#### Optional Step

Additional screening can be done to identify prospects worthy of a personal phone call or formal portfolio inclusion.

This can be done using traditional screening platforms like Target Analytics, AI platforms like DonorSearch AI.

If a prospect who donates below \$500 is flagged by one of these screening platforms they should be included in your mid-level prospect segment.



## Step 3



### Define your mid-level prospect journey criteria

Assuming a \$500 threshold for a mid-level prospect, once a donor makes a gift between \$500 and \$999 or cumulative giving for the year reaches that threshold, we recommend that you immediately push them into an automated digital journey. Please see the sample journey on the next page.

During the automated journey this segment should continue to receive campaigns and stewardship, however, it should be conditionalized to reflect their giving level and mid-level prospect giving status.





## Step 3

1

2

3

4

Now it's time to start building and automating the journey in your email platform.

The journeys should be comprised of 5-8 emails over a 3 month period with the primary goal being to build a relationship with the donor and eventually ask for a meeting or additional gift.

Our goal is to make the donor feel like they are building a relationship with an individual at your organization. This can be done via:

Emails are sent in the first person, introducing them to a dedicated contact at your organization

Emails seem personal and genuine, without all the marketing flare

Consider some plain text emails that mimic sending an email from Outlook

Emails are personalized such as:

Referencing any funds that they may have selected their gift to support

Including information about an area they've indicated an interest in

Share metrics via written paragraphs or stories

Invite prospects to digital events such as a standing weekly patient webinar, either pre-recorded or on YouTube

Weave in more designed vibrant communication in a personal way

Send a FWD style message from a gift officer of a recent newsletter with a more personal tone

Reference a recent initiative made possible with their support

Share a testimonial

At the end of the journey (or peppered throughout), there should be a direct call-to-action asking for a phone call, a bigger gift or to share interest in a planned gift.

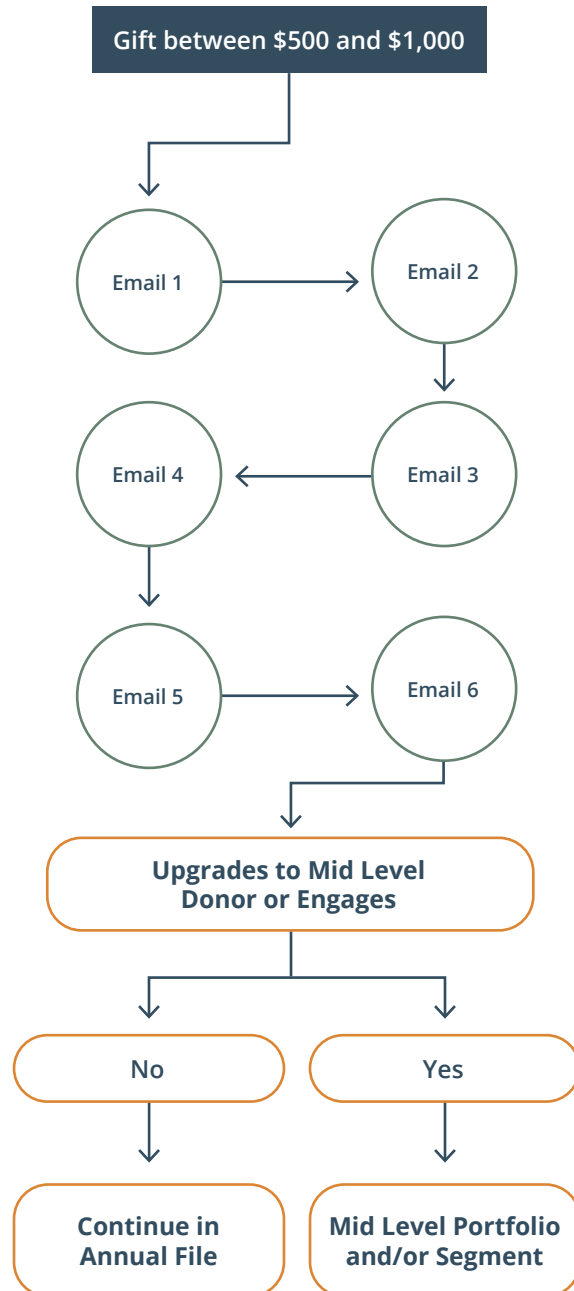
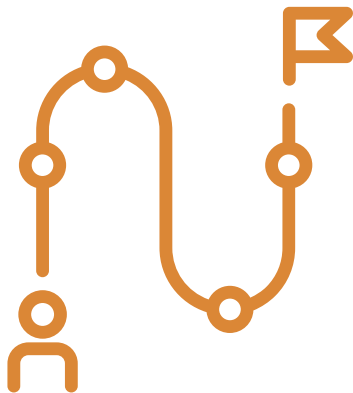


## Step 3



# Sample Journey

Here is a sample primary journey for donors who recently gave \$500.





## Step 4



### Define your post mid-level program and journey

Congratulations, you just digitally acquired a mid-level donor! How will this segment be included in ongoing communication from the rest of the foundation? A few key points that we recommend:

Set up a renewal automation that kicks in after 12 months

Develop a strategy to keep the monthly benefits you promised front and center. This could be via:

Dedicated newsletter showcasing benefits

Dedicated segment in your existing newsletter

Once a month email from the same gift officer in the initial series

If you send frequent fundraising campaigns throughout the year, consider suppressing this group from the “smaller” campaigns and only include them in your larger initiatives like EOY.



# Additional Tactics for Mid-Level Acquisition

Having a well-planned, automated email program will lead to more mid-level donors, and by including some of these additional tactics, can even further your acquisition efforts:

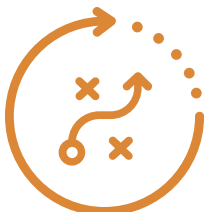
Advertise benefits to your mid-level program on a dedicated web page

Include links to your program page on various communication (ex. Newsletter, impact communication)

Consider including people in the above automation when they make cumulative \$500 gifts in one year

Use dynamic giving arrays to promote upgrades during campaigns

Each year develop a public-facing mid-level goal (ex. We are seeking 1500 mid-level donors in 2025)





# Technology Considerations



The journeys we talk about in this paper will require a single tool or set of tools that allow for:

Email automation

Query and suppression capabilities

Email engagement scoring

Custom landing pages  
(ex. To allow them to share a message, download a PDF, etc.)

Integration with CRM

**Note:** If you have read any of our grateful patient materials, such as our whitepaper or attended one of our webinars, the requirements listed here also apply to a digital grateful patient program.



# Technology Considerations

Here are common technology scenarios we see most often and work with:



## **Integrated Scenario #1**

(RE or BBCRM Customers)

Luminate Online  
Omatic, SimpliPHI, or  
Brightvine for integrations



## **Integrated Scenario #2**

(RE, BBCRM, Salesforce Customers)

Engaging Networks  
Omatic for integrations



## **Integrated Scenario #3**

(Salesforce Customers)

Salesforce Marketing Cloud  
Point donation form solution  
(ex. Classy, FundraiseUp)



## **Point Solution Scenario #1**

(RE NXT Customers)

Email solution (ex. Mailchimp, MyEmma)  
RE NXT Donation Form  
Access to hospital giving website  
to create landing pages and surveys  
Omatic for integrations



## **Point Solution Scenario #2**

(RE NXT, Salesforce Customers)

Email solution (ex. Mailchimp, MyEmma)  
Point donation form solution  
(ex. Classy, FundraiseUp)  
Access to hospital giving website  
to create landing pages and surveys





# How can Doing Good Digital help?

Doing Good Digital specializes in hospital fundraising technology and digital fundraising strategy. We work with clients in two ways:

1

Monthly retainer to grow your digital results, in combination with your direct mail firm

2

Collaborate on a single project, such as:

- Digital audit
- Digital journey planning and implementation
- Mid-level journey planning and implementation
- Technology implementation (Luminate Online, Engaging Networks etc.)
- Website



If you have any questions, recommendations or stories on how you have grown your mid level program, we would love to hear from you!





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